11/14/83
A4957-2

QUARTERLY REPORT

1611 NORTH KENT STREET SUITE 900 ARLINGTON, VIRGINIA 22209 (703) 522-7277

DATE: July 6, 1983

FIRST QUARTER, 1983

PRODUCTION

1983 (3 MOS.) HIGHLIGHTS

	UNITS	TOTAL 1983 1Q	% CHANGE FROM 1982 LEVEL
TOTAL PRODUCTION (N/R)	Mil. Pairs	91.2	5.4
TOTAL SHIPMENTS (N/R)			
• Quantity	Mil. Pairs	88.1	4.9
• Unit Value	Dollars	12.54	4.8
PRODUCTION BY TYPES (N/R)			
• Men's	Mil. Pairs	20.6	17.0
• Women's	Mil. Pairs	34.0	7.3
• Juvenile	Mil. Pairs	13.5	-6.9
• Athletic	Mil. Pairs	5.6	24.4
• Slippers	Mil. Pairs	15.9	-5.4
PRODUCTION BY MATERIAL (N/R)			
• Leather	Mil. Pairs	49.1	8.1
• Vinyl/Plastic	Mil. Pairs	21.9	1.4
• Other	Mil. Pairs	20.2	3.6
RUBBER/FABRIC PRODUCTION	Mil. Pairs	21.4	-6.6

FIA

FOOTWEAR INDUSTRIES OF AMERICA

TABLE 1: U.S. PRODUCTION SUMMARY

	(Million Pairs)			1983/82 PERCENT CHANGE
	1Q 1983 (p)	4Q 1982 (r)	1Q 1982	1Q%
NONRUBBER TOTAL	91.2	78.7	86.5	5.4
RUBBER/FABRIC TOTAL	21.4	17.3	22.9	-6.6
NONRUBBER AND RUBBER/FABRIC TOTAL	112.6	96.0	109.4	2.9

Source: U.S. Department of Commerce, Bureau of the Census.

TABLE 2: NONRUBBER FOOTWEAR BY KIND

KIND	(Million Pairs) 1Q 1983	4Q 1982	1Q 1982	1983/82 % CHANGE 1Q %
MEN'S	20.6	17.1	17.6	17.0
YOUTHS' & BOYS'	1.9	1.6	1.7	11.8
WOMEN'S	34.0	29.1	31.7	7.3
MISSES'	2.3	2.6	2.6	-11.5
CHILDREN'S	3.8	2.7	3.9	-2.6
INFANTS'	5.5	3.8	6.3	-12.7
ATHLETIC	5.6	4.3	4.5	24.4
SLIPPERS	15.9	16.4	16.8	-5.4
OTHER	1.6	1.2	1.3	23.1
TOTAL SHOES & SLIPPERS	91.2	78.7	86.5	5.4

Source: U.S. Department of Commerce, Bureau of the Census.

TABLE 3: NONRUBBER FOOTWEAR BY MATERIAL

KIND	(Million Pairs) 1Q 1983	4Q 1982	1Q 1982	1983/82 % CHANGE 1Q %
LEATHER	49.1	42.6	45.4	8.1
PLASTIC/VINYL	21.9	17.1	21.6	1.4
OTHER	20.2	19.0	19.5	3.6

Source: U.S. Department of Commerce, Bureau of the Census.

TABLE 4: NONRUBBER FOOTWEAR, DOMESTIC SHIPMENTS

KIND	(Mil.Prs.,Mil. Dollars) 1Q 1983	4Q 1982	1Q 1982	1983/82 % CHANGE 1Q %
QUANTITY	88.1	81.4	84.0	4.9
VALUE $	1104.4	1047.4	1004.7	9.9
AVERAGE VALUE $ (Dollar per pair)	12.54	12.87	11.96	4.8

Source: U.S. Department of Commerce, Bureau of the Census.

U. S. IMPORTS

1983 (3 MOS.) HIGHLIGHTS

TOTAL IMPORTS (N/R)	UNITS	TOTAL 1983 1Q	% CHANGE FROM 1982 LEVEL
• Quantity	Mil. Pairs	160.4	23.6
• Value (fob)	Mil. Dollars	926.8	23.3
• Unit Value	Dollars	5.78	-0.2
BY TYPES (N/R)			
• Men's	Mil. Pairs	31.2	44.9
• Women's	Mil. Pairs	85.5	18.2
• Juvenile	Mil. Pairs	18.9	22.7
• Athletic	Mil. Pairs	23.5	20.7
BY MATERIAL (N/R)			
• Leather Footwear	Mil. Pairs	69.6	30.9
• Vinyl/Plastic	Mil. Pairs	56.8	8.6
• Other	Mil. Pairs	36.1	47.8
BY COUNTRY (N/R)			
• Taiwan	Mil. Pairs	67.3	43.7
• Korea	Mil. Pairs	28.3	66.2
• Brazil	Mil. Pairs	15.7	30.6
• Hong Kong	Mil. Pairs	5.0	-36.5
• China	Mil. Pairs	1.9	-2.3
• Italy	Mil. Pairs	22.5	1.6
• Spain	Mil. Pairs	6.3	8.6
UNLASTED LEATHER SHOES UPPERS	Mil. Pairs	2.9	22.4
ALL OTHER SHOE UPPERS	Mil. Pairs	5.4	56.5
RUBBER/FABRIC FOOTWEAR	Mil. Pairs	34.6	2.9
• Taiwan	Mil. Pairs	Not compiled at this time. Will be published in 2nd quarter report	
• Korea	Mil. Pairs		
• China	Mil. Pairs		

TABLE 5: U.S. IMPORTS SUMMARY

KIND	(Million Pairs) 1Q 1983	4Q 1982	1Q 1982	1983/82 PERCENT CHANGE 1Q%
NONRUBBER TOTAL	160.4	101.2	129.8	23.6
RUBBER/FABRIC TOTAL	34.6	19.2	33.6	2.9
NONRUBBER AND RUBBER/FABRIC TOTAL	195.0	120.4	163.4	19.3

Source: U.S. Department of Commerce

TABLE 6: NONRUBBER FOOTWEAR BY KIND

6A. Quantity

KIND	(Million Pairs) 1Q 1983	4Q 1982	1Q 1982	1983/82 PERCENT CHANGE 1Q%
MEN'S	31.2	22.6	21.5	44.9
YOUTHS' & BOYS'	1.9	1.8	1.3	42.8
WOMEN'S	85.5	49.6	72.4	18.2
MISSES'	5.0	2.8	4.4	13.2
CHILDREN'S	7.2	3.8	5.9	22.2
INFANTS'	4.9	2.7	3.8	26.7
ATHLETIC	23.5	17.3	19.5	20.7
SLIPPERS & ALL OTHER	1.3	0.5	1.0	30.0
TOTAL - ALL	160.4	101.2	129.8	23.6

6B. Unit Value

KIND	(Dollars per Pair) 1Q 1983	4Q 1982	1Q 1982	1983/82 PERCENT CHANGE 1Q%
MEN'S	7.05	8.22	7.45	-5.4
YOUTHS' & BOYS'	4.32	4.90	4.84	-10.7
WOMEN'S	5.72	6.54	5.67	0.8
MISSES'	3.21	4.54	3.14	2.2
CHILDREN'S	2.76	3.63	2.36	16.9
INFANTS'	1.84	2.04	1.57	17.2
ATHLETIC	6.80	7.99	6.96	-2.3
SLIPPERS & ALL OTHER	3.86	7.80	5.27	-26.8
TOTAL - ALL	5.78	6.85	5.79	-0.2

Source: U.S. Department of Commerce

TABLE 7: NONRUBBER FOOTWEAR IMPORTS BY MATERIAL

7A. Quantity

MATERIAL	(Million Pairs) 1Q 1983	4Q 1982	1Q 1982	1983/82 PERCENT CHANGE 1Q%
Leather	69.6	47.6	53.1	30.9
Vinyl/Plastic	56.8	33.0	52.3	8.6
Other	36.1	20.5	24.4	47.8

7B. Unit Value

MATERIAL	(Dollars per Pair) 1Q 1983	4Q 1982	1Q 1982	1983/82 PERCENT CHANGE 1Q%
Leather	8.52	9.64	9.14	-6.8
Vinyl/Plastic	3.22	4.26	3.62	-11.0
Other	4.20	4.57	3.12	34.6

Source: U.S. Department of Commerce

TABLE 8: NONRUBBER FOOTWEAR IMPORTS BY COUNTRY

8A. Quantity

	(Million Pairs) 1Q 1983	4Q 1982	1Q 1982	1983/82 PERCENT CHANGE 1Q%
Taiwan	67.3	39.1	46.9	43.7
Korea	28.3	22.1	17.0	66.2
Italy	22.5	9.0	22.1	1.6
Spain	6.3	5.1	5.8	8.6
Brazil	15.7	9.9	12.0	30.6
France	1.2	1.1	0.9	31.7
Mexico	1.3	1.6	1.1	23.2
India	0.6	0.1	0.5	2.2
Poland	0.3	0.1	0.1	334.2
Romania	0.6	0.7	0.8	-16.8
Yugoslavia	0.4	0.5	0.4	23.1
Singapore	*	—	0.3	-81.5
Japan	0.9	0.9	1.4	-40.7
Hong Kong	5.0	4.0	7.8	-36.5
Philippines	3.2	1.3	4.2	-23.6
Austria		0.2	0.3	
Thailand	1.7	0.4	3.0	-41.9
Greece	0.4	0.2	0.9	-53.1
China	1.9	1.4	2.0	-2.3
TOTAL WORLD	160.4	101.2	129.8	23.6

*Less than 50,000 pairs

Source: U.S. Department of Commerce

8B. Unit Value

	(Dollars per Pair)			
	1Q 1983	4Q 1982	1Q 1982	1983/82 PERCENT CHANGE 1Q%
Taiwan	3.96	4.78	3.94	0.5
Korea	5.92	6.41	6.56	-9.8
Italy	8.99	12.24	8.47	6.1
Spain	9.38	9.83	10.50	-10.7
Brazil	7.50	8.95	7.14	5.0
France	17.40	18.05	15.84	9.8
Mexico	5.61	6.55	7.84	-28.4
India	4.21	6.83	4.98	-15.5
Poland	5.48	6.55	12.33	-55.6
Romania	7.25	8.47	8.36	-13.3
Yugoslavia	9.63	10.30	9.83	-2.0
Singapore	0.71	—	1.42	-50.0
Japan	6.63	7.73	3.50	89.4
Hong Kong	2.56	2.63	2.17	18.0
Philippines	3.15	4.21	3.00	5.0
Austria		9.97	7.15	
Thailand	2.32	5.31	1.56	48.7
Greece	9.03	12.79	8.87	1.8
China	3.00	2.70	3.17	-5.4
TOTAL WORLD	5.78	6.85	5.79	-0.2

*Less than 50,000 pairs
Source: U.S. Department of Commerce

TABLE 9: RUBBER/FABRIC IMPORTS BY COUNTRY

	(Million Pairs)			
	1Q 1983	4Q 1982	1Q 1982	1983/82 PERCENT CHANGE 1Q%
Taiwan	Not compiled at this time. Will be published in 2nd QR	5.0	15.6	
Korea		9.0	10.1	
China		1.8	2.9	
Italy		0.1	1.5	
Hong Kong		0.5	0.8	
Mexico		2.2	0.7	
All Other		0.6	1.0	
TOTAL WORLD		19.2	33.6	

Source: U.S. Department of Commerce, Bureau of Census

TABLE 10: UNLASTED LEATHER SHOE UPPERS BY COUNTRY

COUNTRY	(Thousand Pairs) 1Q 1983	4Q 1982	1Q 1982	1983/82 PERCENT CHANGE 1Q%
Mexico	105.0	150.0	179.5	-41.5
India	434.8	318.7	380.3	14.3
Haiti	314.7	148.0	233.4	34.8
Brazil	271.2	175.9	124.0	118.7
Columbia	3.4	2.0	—	+%
Korea	777.5	675.4	693.9	12.0
Taiwan	230.6	389.3	275.3	-16.2
Dominican Republic	576.0	369.0	428.9	34.3
Salvador	—	—	—	—
All Other	231.6	351.3	90.3	156.5
TOTAL WORLD	2944.8	2579.6	2405.6	22.4

Source: U.S. Department of Commerce

TABLE 11: RUBBER/PLASTIC, COTTON & FIBER UPPERS BY COUNTRY

COUNTRY	(Thousand Pairs) 1Q 1983	4Q 1982	1Q 1983	1983/82 PERCENT CHANGE 1Q%
Dominican Republic	1485.9	1326.0	831.0	78.8
Hong Kong	147.2	174.2	273.3	-46.1
Salvador	21.3	17.1	9.6	121.9
Haiti	28.3	30.0	200.5	-85.9
Korea	80.3	167.9	9.0	792.2
Taiwan	3528.9	1683.1	2041.4	72.9
All Other	133.2	147.1	101.6	31.1
TOTAL WORLD	5425.1	3545.4	3466.6	56.5

Source: U.S. Department of Commerce

U. S. EXPORTS

1983 (3 MOS.) HIGHLIGHTS

TOTAL EXPORTS (N/R)	UNITS	1 Q 1983	% CHANGE FROM 1982 LEVEL
• Quantity	Mil. Pairs	1.74	-17.0
• Value (fob)	Mil. Dollars	22.8	-15.2
• Unit Value	Dollars	13.09	2.1
EXPORTS BY TYPES (N/R)			
• Men's	Thous. Pairs	453	-31.9
• Women's	Thous. Pairs	530	-7.8
• Juvenile	Thous. Pairs	194	40.6
• Athletic Total	Thous. Pairs	441	-21.9
Sports	Thous. Pairs	289	-34.2
Running	Thous. Pairs	152	20.6
• Slippers	Thous. Pairs	118	-24.4
EXPORTS BY COUNTRY (N/R)			
• Canada	Thous. Pairs	Not compiled at this time. Will be published in the second quarter report	
• Mexico	Thous. Pairs		
• Japan	Thous. Pairs		
• Venezuela	Thous. Pairs		
• France	Thous. Pairs		
• West Germany	Thous. Pairs		
• Argentina	Thous. Pairs		
*Less than 500 pairs			
EXPORTS BY MATERIAL (N/R)			
• Leather	Thous. Pairs	713	-23.1
• Non-leather	Thous. Pairs	1,029	-12.2

TABLE 12: U.S. EXPORTS, QUANTITY & VALUE

	1Q 1983	4Q 1982	1Q 1982	1983/82 PERCENT/CHANGE 1Q8
PAIRS (in millions)	1.74	2.27	2.10	-17.0
VALUE (in millions) $	22.8	26.3	26.9	-15.2
AVERAGE VALUE (dollar/pair)	13.09	11.59	12.82	2.1

Source: U.S. Department of Commerce

TABLE 13: U.S. EXPORTS BY KIND

13A. Quantity

KIND	(Thousand Pairs) 1Q 1983	4Q 1982	1Q 1982	1983/82 PERCENT/CHANGE 1Q%
MEN'S	453	530	665	-31.9
YOUTHS' & BOYS'	23	34	27	-14.8
WOMEN'S TOTAL	530	635	575	-7.8
Sandals	276	328	222	24.3
Boots	64	154	212	-69.8
Other	190	153	141	34.8
MISSES, CHILDREN'S & INFANTS'	171	184	111	54.1
ATHLETIC TOTAL	441	657	565	-21.9
Designed for Sports	289	561	439	-34.2
Joggers & Running	152	96	126	20.6
SLIPPERS	118	229	156	-24.4

13B. Unit Value

KIND	(Dollars per Pair) 1Q 1983	4Q 1982	1Q 1982	1983/82 PERCENT/CHANGE 1Q%
MEN'S	18.04	18.01	17.96	0.4
YOUTHS' & BOYS'	3.83	5.88	8.26	-53.6
WOMEN'S TOTAL	10.85	10.69	9.67	12.2
Sandals	10.35	10.13	8.04	28.7
Boots	10.55	10.75	9.53	10.7
Other	11.67	11.85	12.52	-6.8
MISSES, CHILDREN'S & INFANTS'	6.92	5.79	6.42	7.8
ATHLETIC TOTAL	15.34	11.59	12.52	11.0
Designed for Sports	17.43	11.23	12.86	35.5
Other	11.37	13.69	17.14	-33.7
SLIPPERS	7.12	4.80	4.28	66.4

Source: U.S. Department of Commerce

TABLE 14: U.S. EXPORTS BY COUNTRY

14A. Quantity

COUNTRY	(Thousand Pairs) 1Q 1983	4Q 1982	1Q 1982	1983/82 PERCENT CHANGE 1Q%
Canada	Not compiled at this time. Will be published in the second quarter report	262	378	
Bahamas		135	77	
Venezuela		124	111	
Japan		293	201	
Mexico		150	233	
N. Antilles		91	57	
Norway		16	27	
W. Germany		44	22	
Bermuda		20	24	
United Kingdom		26	41	
Sweden		23	35	
Honduras		29	35	
France		55	101	
Columbia		94	32	
Trinidad		86	132	
Netherlands		37	12	
Italy		87	49	
Panama		9	11	
Switzerland		28	11	
Argentina		*	*	
Liberia		44	56	

*Less than 500 pairs

14B. Unit Value

COUNTRY	(Dollars per Pair) 1Q 1983	4Q 1982	1Q 1982	1983/82 PERCENT CHANGE 1Q%
Canada	Not compiled at this time. Will be published in the second quarter report	8.03	10.00	
Bahamas		8.42	7.57	
Venezuela		12.18	11.24	
Japan		11.92	19.81	
Mexico		3.93	5.94	
N. Antilles		9.62	10.12	
Norway		17.81	20.84	
W. Germany		14.91	16.32	
Bermuda		11.65	11.16	
United Kingdom		14.65	17.05	
Sweden		11.04	22.15	
Honduras		6.59	8.21	
France		16.16	18.66	
Columbia		15.82	13.82	
Trinidad		12.06	7.76	
Netherlands		10.11	15.87	
Italy		31.00	22.54	
Panama		12.56	17.18	
Switzerland		19.43	17.01	
Argentina		—	—	
Liberia		8.36	8.73	

Source: U.S. Department of Commerce

TABLE 15: EXPORTS BY TYPES OF UPPERS

LEATHER UPPERS

15A. Quantity

KIND	(Thousand Pairs) 1Q 1983	4Q 1982	1Q 1982	1983/82 PERCENT CHANGE 1Q%
MEN'S	234	267	361	-35.2
YOUTHS' & BOYS'	7	16	14	-50.0
WOMEN'S TOTAL	268	340	314	-14.6
Sandals	113	166	82	37.8
Boots	50	121	155	-67.7
Other	105	53	77	36.4
MISSES', CHILDREN'S & INFANTS'	36	47	33	9.1
ATHLETIC TOTAL	136	132	174	-21.8
Designed for Sports	117	109	156	-25.0
Joggers & Running	19	23	18	5.6
SLIPPERS	32	136	31	3.2
TOTAL	713	938	927	-23.1

15B. Unit Value

KIND	(Dollars per Pair) 1Q 1983	4Q 1982	1Q 1982	1983/82 PERCENT CHANGE 1Q%
MEN'S	27.01	27.02	24.85	8.7
YOUTHS' & BOYS'	5.43	6.88	9.26	-41.4
WOMEN'S TOTAL	11.27	10.91	10.56	6.7
Sandals	11.75	10.43	10.17	15.5
Boots	10.78	10.64	9.51	13.4
Other	10.98	13.04	13.11	-16.2
MISSES', CHILDREN'S & INFANTS'	13.64	6.34	7.22	88.9
ATHLETIC TOTAL	20.29	16.55	17.76	14.2
Designed for Sports	20.63	16.92	15.30	34.8
Joggers & Running	18.21	14.83	39.41	-53.8
SLIPPERS	6.67	2.89	8.59	-22.4
TOTAL	18.01	14.83	17.28	4.2

TABLE 15: EXPORTS BY TYPES OF UPPERS

NONLEATHER UPPERS

15C. Quantity

KIND	(Thousand Pairs) 1Q 1983	4Q 1982	1Q 1982	1983/82 PERCENT CHANGE 1Q%
MEN'S	219	263	304	-28.0
YOUTHS' & BOYS'	16	18	13	23.1
WOMEN'S TOTAL	262	295	261	0.4
Sandals	163	162	140	16.4
Boots	14	33	57	-75.4
Other	85	100	64	32.8
MISSES', CHILDREN'S & INFANTS'	141	137	78	80.8
ATHLETIC TOTAL	305	525	391	-22.0
Designed for Sports	172	452	283	-39.2
Joggers & Running	133	73	108	23.1
SLIPPERS	86	93	125	-31.2
TOTAL	1029	1331	1172	-12.2

15D. Unit Value

KIND	(Dollars per Pair) 1Q 1983	4Q 1982	1Q 1982	1983/82 PERCENT CHANGE 1Q%
MEN'S	8.45	8.86	9.78	-13.6
YOUTHS' & BOYS'	3.13	5.00	6.73	-53.5
WOMEN'S TOTAL	10.41	10.44	8.60	21.0
Sandals	9.37	9.82	6.79	38.0
Boots	9.71	11.15	9.60	1.1
Other	12.52	11.22	11.82	5.9
MISSES', CHILDREN'S & INFANTS'	4.91	5.60	6.04	-18.7
ATHLETIC TOTAL	13.13	10.34	12.06	8.9
Designed for Sports	15.24	9.86	11.55	31.9
Joggers & Running	10.39	13.33	13.42	-22.6
SLIPPERS	7.29	7.59	3.20	127.8
TOTAL	9.67	9.32	9.30	4.0

Source: U.S. Department of Commerce

MARKET SUPPLY

1983 (3 MOS.) HIGHLIGHTS

	UNITS	TOTAL 1983 1Q	% CHANGE FROM 1982 LEVEL
TOTAL MARKET (N/R & R/F)	Mil. Pairs	305.9	13.0
• Nonrubber (N/R)	Mil. Pairs	249.9	16.7
• Rubber/Fabric (R/F)	Mil. Pairs	56.0	-0.9
IMPORT SHARE OF MARKET (N/R & R/F)	Percent	63.8	5.6
• Nonrubber	Percent	64.2	5.9
• Rubber/Fabric	Percent	61.8	3.9
MARKET BY TYPES (N/R)			
• Men's Market	Mil. Pairs	51.8	32.5
Import Share	Percent	60.2	9.5
• Women's Market	Mil. Pairs	119.5	14.8
Import share	Percent	71.6	2.9
• Juvenile Market	Mil. Pairs	32.4	8.4
Import Share	Percent	58.3	13.2
• Athletic Market	Mil. Pairs	29.1	21.3
Import Share	Percent	80.8	-0.6
MARKET BY MATERIAL (N/R)			
• Leather Footwear	Mil. Pairs	118.7	20.5
Import Share	Percent	58.6	8.7
• Vinyl/Plastic Footwear	Mil. Pairs	78.7	6.5
Import share	Percent	72.2	2.0
• Other Footwear	Mil. Pairs	56.3	28.2
Import Share	Percent	64.1	15.3

TABLE 16: TOTAL MARKET SUPPLY

TABLE 16A. NONRUBBER FOOTWEAR

	(Million Pairs)			1983/82
	1Q 1983	4Q 1982	1Q 1982	PERCENT CHANGE 1Q%
Domestic	91.2	78.7	86.5	5.4
Imports	160.4	101.2	129.8	23.6
Exports	1.7	2.3	2.1	-17.0
Market Supply	249.9	177.6	214.2	16.7
Import Penetration (%)	64.2	57.0	60.6	5.9

TABLE 16B. RUBBER/FABRIC FOOTWEAR

	(Million Pairs)			1983/82
	1Q 1983	4Q 1982	1Q 1982	PERCENT CHANGE 1Q%
Domestic	21.4	17.3	22.9	-6.6
Imports	34.6	19.2	33.6	2.9
Market Supply	56.0	36.5	56.5	-0.9
Import Penetration* (%)	61.8	52.6	59.5	3.9

TABLE 16C. NONRUBBER AND RUBBER/FABRIC

	(Million Pairs)			1983/82
	1Q 1983	4Q 1982	1Q 1982	PERCENT CHANGE 1Q%
Domestic	112.6	96.0	109.4	2.9
Imports	195.0	120.4	163.4	19.3
Exports **	1.7	2.3	2.1	-17.0
Market Supply	305.9	214.1	270.7	13.0
Import Penetration (%)	63.8	56.2	60.4	5.6

*Import share of market including small quantities of exports
**Non-rubber only
Source: U.S. Department of Commerce

TABLE 17: MARKET BY KIND

KIND	(Million Pairs) 1Q 1983	4Q 1982	1Q 1982	1983/82 PERCENT CHANGE 1Q%
MEN'S	51.8	39.7	39.1	32.5
YOUTHS' & BOYS'	3.8	3.4	3.0	26.7
WOMEN'S	119.5	78.7	104.1	14.8
MISSES'	7.3	5.4	7.0	4.3
CHILDREN'S	11.0	6.5	9.8	12.2
INFANTS'	10.4	6.5	10.1	3.0
ATHLETIC	29.1	21.6	24.0	21.3
SLIPPERS & OTHER	18.8	18.1	19.1	-1.6

Note: Market = U.S. Production plus U.S. Imports including small quantities of exports in each kind.
Source: U.S. Department of Commerce.

TABLE 18: IMPORT PENETRATION OF MARKET BY KIND

	(Million Pairs) 1Q 1983	4Q 1982	1Q 1982	1983/82 PERCENT CHANGE 1Q%
MEN'S	60.2	56.9	55.0	9.5
YOUTHS' & BOYS'	50.0	52.9	43.3	15.5
WOMEN'S	71.6	63.0	69.6	2.9
MISSES'	68.5	51.9	62.9	8.9
CHILDREN'S	65.5	58.5	60.2	8.8
INFANTS'	47.1	41.5	37.6	25.3
ATHLETIC	80.8	80.1	81.3	-0.6
SLIPPERS & OTHER*	6.9	2.8	5.2	32.7

*Owing to narrow and imperfect definition of slippers in U.S. Tariff Schedule, import penetration is estimated to be understated by about seventy-five percent.
Source: U.S. Department of Commerce

TABLE 19: MARKET SUPPLY AND IMPORT PENETRATION BY MATERIAL

	(Million Pairs)			1983/82
	1Q 1983	4Q 1982	1Q 1983	PERCENT CHANGE 1Q%
Leather				
Domestic	49.1	42.6	45.4	8.1
Imports	69.6	47.6	53.1	30.9
Total Supply	118.7	90.2	98.5	20.5
Import Penetr on(%)	58.6	52.8	53.9	8.7
Vinyl/Plastic				
Domestic	21.9	17.1	21.6	1.4
Imports	56.8	33.0	52.3	8.6
Total Supply	78.7	50.1	73.9	6.5
Import Penetration(%)	72.2	65.9	70.8	2.0
Other				
Domestic	20.2	19.0	19.5	3.6
Imports	36.1	20.5	24.4	47.8
Total Supply	56.3	39.5	43.9	28.2
Import Penetration(%)	64.1	51.9	55.6	15.3

Source: U.S. Department of Commerce

LABOR

1983 (3 MOS.) HIGHLIGHTS

	UNITS	TOTAL 1983 1Q	% CHANGE FROM 1982 LEVEL
EMPLOYMENT & EARNINGS			
• All Employees	Thousands	126.6	-3.8
• Production Employees	Thousands	107.4	-4.4
- Average hourly earnings	Dollar	5.24	4.4
- Average weekly hours	Hours	34.5	1.5
PRODUCTIVITY			
• Production/production employee hour	# Pairs	1.97	8.8

TABLE 20: EMPLOYMENT AND EARNINGS

	1Q 1983	4Q 1982	1Q 1983	1983/82 PERCENT CHANGE 1Q%
All Employees (000)	126.6	126.4	131.6	-3.8
Prod. Workers (000)	107.4	107.3	112.4	-4.4
Ave. Weekly Earnings $	180.90	183.20	170.98	5.8
Ave. Hourly Earnings $	5.24	5.18	5.02	4.4
Average Weekly Hours	34.5	35.4	34.0	1.5

Source: Bureau of Labor Statistics (BLS), U.S. Department of Labor

TABLE 21: PRODUCTIVITY
(PRODUCTION PER PRODUCTION EMPLOYEE HOUR)

	1Q 1983	4Q 1982	1Q 1982	1983/82 PERCENT CHANGE 1Q%
Production (Mil. Prs.)	91.2	78.7	86.5	5.4
Production Employee total hours (Mil.)	46.3	47.5	47.8	-3.1
Production per employee hour (pairs	1.97	1.66	1.81	8.8

Source: FIA

PRICES

1983 (3 MOS.) HIGHLIGHTS

	UNITS	TOTAL 1983 1Q	% CHANGE FROM 1982 LEVEL
PRODUCER PRICE INDEX			
• All Commodities	1967=100	300.5	0.7
• Cattlehides	1967=100	332.2	-10.5
• Cattlehide Leather	1967=100	316.8	0.3
• Nonrubber Footwear	1967=100	248.0	3.7
CONSUMER PRICE INDEX			
• All items	1967=100	293.2	3.6
• Footwear (all)	1967=100	205.7	1.1

TABLE 22: PRODUCER PRICE INDEX

	(1967 = 100)			1983/82
	1Q 1983	4Q 1982	1Q 1982	PERCENT CHANGE 1Q%
All Commodities	300.5	300.2	298.3	0.7
Cattlehides	332.2	323.4	371.2	-10.5
All Leathers	314.5	312.2	316.7	-0.7
Cattlehide Leather	316.8	317.0	315.8	0.3
Nonrubber Footwear	248.0	248.8	239.1	3.7
Men's & Boys' Footwear	284.8	285.9	280.9	1.4
Women's & Misses' Footwear	224.1	225.9	210.7	6.4
Children's and Infants' Footwear	208.2	207.3	205.3	1.4

Source: BLS, U.S. Department of Labor.

TABLE 23: CONSUMER PRICE INDEX

	(1967 = 100)			1983/82
	1Q 1983	4Q 1982	1Q 1982	PERCENT CHANGE 1Q%
All Items	293.2	293.4	283.0	3.6
Apparel & Upkeep	192.5	194.8	188.8	2.0
Footwear (all)	205.7	206.5	203.5	1.1

Source: Bureau of Labor Statistics (BLS), U.S. Department of Labor

RETAIL SALES

1983 (3 MOS.) HIGHLIGHTS

	UNITS	TOTAL 1983 1Q	% CHANGE FROM 1983 LEVEL
Department Chains	Mil. Dollars	20,334	6.8
Shoe Chains	Mil. Dollars	997	13.7
Apparel Chains	Mil. Dollars	4,151	10.0
Shoe Stores - Independent	Mil. Dollars	1,244	-0.6
Apparel Stores - Independent	Mil. Dollars	6,757	-3.8

(The above outlets represent about 90% of total shoe sales)

TABLE 24: RETAIL SALES

	(Million Dollars)			1983/82 PERCENT CHANGE
	1Q 1983	4Q 1982	1Q 1982	1Q%
TOTAL - ALL	253,464	298,801	240,123	5.6
Department Stores	21,154	36,870	19,851	6.6
Apparel Stores	10,908	16,389	10,795	1.0
Shoe Stores	2,241	2,842	2,128	5.3
Chain Stores-Total	87,689	116,256	83,153	5.5
Department Stores	20,334	35,437	19,032	6.8
Apparel Stores	4,151	6,718	3,774	10.0
Shoe Stores	997	1,304	877	13.7
Independent Stores-Total	165,775	182,545	156,970	5.6
Department Stores	820	1,433	819	0.1
Apparel Stores	6,757	9,671	7,021	-3.8
Shoe Stores	1,244	1,538	1,251	-0.6

Source: Bureau of the Census

PERSONAL CONSUMPTION EXPENDITURES (PCE)

1983 (3 MOS.) HIGHLIGHTS

	UNITS	TOTAL 1983 1Q	% CHANGE FROM 1982 LEVEL
PCE ON SHOES	Billion Dollars Annualized rate	20.1	1.0
As a percent of PCE on:			
• All goods & services	Percent	0.98	-5.8
• Nondurable goods	Percent	2.59	-2.6
• Clothing & shoes	Percent	16.75	-1.1

TABLE 25: PERSONAL CONSUMPTION EXPENDITURES

	(Billion Dollars)			1983/82 PERCENT CHANGE
	1Q 1983	4Q 1982	1Q 1982	1Q%
Total PCE - All Goods and Services	2054.0	2030.8	1919.4	7.0
Durable Goods	256.4	251.8	237.9	7.8
Services	1021.2	1003.3	932.4	9.5
Nondurable Goods	776.4	775.5	749.1	3.6
Clothing & Shoes	120.0	119.4	117.5	2.1
Shoes	20.1	19.5	19.9	1.0
PCE on shoes as a percentage of total PCE on:				
All Goods	0.98	0.96	1.04	-5.8
Durable Goods	7.84	7.74	8.36	-6.2
Nondurable Goods	2.59	2.51	2.66	-2.6
Clothing & Shoes	16.75	16.33	16.94	-1.1

Source: U.S. Department of Commerce